

DOI “Getting to Green” Scorecard for DOI Bureaus

Initiative: Internal (Bureau) Asset Management Scorecard

SCORECARD CRITERIA:

1. Produce Accurate and Complete Inventory and Report to Federal Real Property Profile (FRPP) (Inventory)
2. Performance Measure Utilization
3. Performance Measure Condition Index
4. Performance Measure Mission Dependency
5. Performance Measure Operation and Maintenance Costs
6. Fleet Management Initiative
7. Disposal

COMPOSITE SCORE (Average of 1-7):

RATING PERIOD:

10-Point Scoring Key: 1-3 Red 4-6 Yellow 7-9 Green 10 Blue

CRITERION	DESCRIPTION	METRIC	RATING
<p>Criterion #1:</p> <p>Produce Accurate and Complete Inventory and Report to Federal Real Property Profile (FRPP)</p> <p>Bureau Managers have complete asset inventory information and are able to report all 23 data elements to the FRPP.</p> <p><i>Links to DOI Asset Management Plan – Accurate and current inventory; used in management decision-making ; and evidence that real property management reporting is consistent with Federal Real Property Council (FRPC) Recommendations.</i></p>	<p>In order to comply with the Executive Order 13327, the Bureaus must have a complete and accurate asset inventory and develop an acceptable methodology for gathering and collecting the information and reporting to the FRPP and the Department of the Interior.</p> <p>The Federal Real Property Council (FRPC) has identified and defined 23 mandatory data elements (of which four are performance metrics that are covered in criterion 2 through 5).that will be captured and reported by all agencies. All data elements will apply to owned and leased property. Agencies must request a OMB waiver if necessary for any gaps.</p> <p>All major agencies are expected to maintain a comprehensive inventory of their owned assets by the first quarter of FY2006. These agency inventories will be reported to the General Services Administration (GSA) to become part of an interim government-wide database. The GSA data base is currently referred to as the “Federal Real Property Profile” (FRPP).</p> <p>The bureaus are to provide their strategy for implementing the 23 inventory data and performance metrics by June 1, 2005. Deviations from the constructed asset level reporting requirement for FY05 are to be coordinated with OMB through the Interior Senior Real Property Officer.</p>	<p>1-3 – Bureau/Office has information and is reporting on 19 static data elements on 10-30% of constructed assets by asset type.</p> <p>4-6 -- Bureau/Office is able to report inventory of assets on 31-60% of assets at the constructed asset level to the Department.</p> <p>7-9 -- Bureau/Office is able to report inventory of 61-99% assets at the constructed asset level to the Department.</p> <p>10 -- Bureau/Office is able to report inventory of assets at the constructed asset level (except for waivers) for all types of assets 100% to the Department.</p>	
TOTAL			

CRITERION	DESCRIPTION	METRIC	RATING
<p>Criterion #2:</p> <p>Performance Measure – Utilization</p> <p>Bureaus have an indicator of the rate of utilization of assets and can use it as a factor in decision-making. The Federal Real Property Council (FRPC) performance measure can be reported to the Federal Real Property Profile (FRPP).</p> <p><i>Linked to DOI Asset Management Plan – Consistent with FRPC standards; Used in management decision-making; and evidence that plan is being implemented to achieve improved real property management.</i></p>	<p>Underutilized assets suppress performance, consume capital, are costly to retain, and inhibit opportunity.</p> <p>Each Bureau will identify underutilized assets and take corrective action to ensure that the number of assets in use matches the demand for those within the bureau as described in the Department's Asset Management Plan. Retained assets must be examined to ensure its importance to the core mission.</p> <p>Initially, utilization will need to be reported only for five real property categories: offices, warehouses, hospitals, laboratories, and housing. Agencies will report the utilization category (over-utilized, utilized, under-utilized, not utilized) to the government-wide database—FRPP.</p> <p>The bureaus are to provide their strategy for implementing the 23 inventory data and performance metrics by June 1, 2005.</p>	<p>1-3 – Bureau demonstrates progress in collecting utilization information for less than 50% of the five required real property categories.</p> <p>4-6 – Bureau has complete utilization data for 50-70% of the five required real property categories (offices, warehouses, hospitals, laboratories, and housing), and it can be used to identify underutilized assets. Bureau has reported utilization rate to the Department and to the FRPP.</p> <p>7-9 – Bureau has complete utilization data for 70-100% of the five required real property categories (offices, warehouses, hospitals, laboratories, and housing), and it can be used to identify underutilized assets. Bureau has reported utilization rate to the Department and to the FRPP.</p> <p>10 – Bureau has demonstrated management commitment to improving utilization through new initiatives based on previously collected data. Bureau has identified underutilized assets and consolidation opportunities. Bureau has process in place to ensure full compliance. Recommendations are provided when space is underutilized for elimination of the excess space or reconfiguration of the space.</p>	
TOTAL			

CRITERION	DESCRIPTION	METRIC	RATING
<p>Criterion #3:</p> <p>Performance Measure Condition Index</p> <p>Bureaus have an indicator of the condition of each asset and can use it as a factor in decision-making. The Federal Real Property Council (FRPC) performance measure is reported to the Department and to the Federal Real Property Profile (FRPP).</p> <p><i>Linked to DOI Asset Management Plan – consistent with FRPC standards; Used in management decision-making; and evidence that the Plan is being implemented to achieve improved real property management.</i></p>	<p>The Condition Index is a general measure of constructed asset condition at a specific point in time.</p> <p>Within Interior, Condition Index is commonly known as Facility Condition Index (FCI). The FCI is calculated as the ratio of deferred maintenance (DM) to current replacement value (CRV).</p> <p>Deferred maintenance is the amount necessary to ensure that a constructed asset is restored to a condition substantially equivalent to the originally intended and designed capacity, efficiency or capability. Bureaus/Offices will initially determine deferred maintenance based on existing DOI guidance.</p> <p>Current replacement value is the cost of replacing an existing asset at today's standards.</p> <p>Interior has been using and reporting FCI as a fraction where $FCI = DM/CRV$. For reporting purposes to the FRPP, the guidance from FRPC is to report as a "percent condition" on a scale of 0% to 100% and calculated as $(1 - DM/CRV \times 100)$. In this reporting format, the higher the condition index, the better. This is the opposite of the Interior method.</p> <p>The bureaus are to provide their strategy for implementing the 23 inventory data and performance metrics by June 1, 2005.</p>	<p>1-3 – Bureau Headquarters has supported and directed management and staff to develop protocols and conduct comprehensive condition assessments according to an overall Master Plan. Bureau can demonstrate that 30% of assets have a condition index or a condition assessment:</p> <p>4-6 Bureau can demonstrate that 31-80% constructed assets has had a condition assessment and has a condition index:</p> <p>7-9 –Bureau has continued with implementation of Master Plan to do condition assessments for the remaining assets and is on schedule. Available condition index data for 80- 100% of the constructed assets is adjusted and reported to the Department and to the FRPP.</p> <p>10 – The use of FCI for asset management decision-making is demonstrated.</p>	
TOTAL			

CRITERION	DESCRIPTION	METRIC	RATING
<p>Criterion #4:</p> <p>Performance Measure Mission Dependency</p> <p>Asset investment decisions are centered around assets contribution to mission and based on assets condition. Investment decisions support attainment of annual end outcome goals.</p> <p>Bureaus have an indicator of the contribution to mission of each asset and can use it as a factor in decision-making. The Federal Real Property Council (FRPC) performance measure is reported to the Department and to the Federal Real Property Profile (FRPP).</p> <p><i>Links to DOI Asset Management Plan – Consistent with FRPC standards; used in management decision-making; and evidence that the Plan is being implemented to achieve improved real property management.</i></p>	<p>To ensure the mission of the bureau drives investment and management decisions, the bureau will follow a common DOI methodology for evaluating the importance of each asset to the bureau's mission.</p> <p>Each bureau will determine the degree to which assets support agency mission and strategic goals. Bureau will determine the mission dependency of assets in accordance with the FRPC guidance. Each bureau will, consistent with Department-wide standards, prioritize assets using the Asset Priority Index (API);</p> <p>Each bureau will highlight strategies that align inventories for real property, space and fleet with the bureau's mission, including any management reforms completed or underway within the bureau for improved asset management.</p> <p>Bureaus employing only GSA Occupancy Agreements will provide, at least annually, the status of all agreements and their linkage to current Bureau missions and highlight strategies for managing the portfolio to achieve greater mission dependency.</p> <p>The bureau shall consider the substitutability of the requirements addressed by that asset. The absence of substitutes may be because the asset has historical or cultural significance. Asset Priority Index (API) measures the ability (or inability) to satisfy the operational requirements of that asset by some other means. Other means can include another asset, a change in business processes, or the use of technology.</p> <p>The bureaus are to provide their strategy for implementing the 23 inventory data and performance metrics by June 1, 2005.</p>	<p>1-3 – Bureau Headquarters has supported and directed management and staff to develop Asset Priority Index (API) tool and begins assigning mission dependency to assets on 30% of constructed assets.</p> <p>4-6 - Bureau can demonstrate that each asset in the following categories has had mission dependency assessed: Offices, warehouses, hospitals, laboratories, and housing. Bureau has included mission dependency in its investment decision making process. Bureaus with GSA Occupancy Agreements provide annual reports on the linkage to bureau mission with projections of required GSA space, without plans for maximizing space return. Bureau has reported mission dependency to the Department and to the FRPP on 31-80% of constructed assets:</p> <p>7-9 – Bureau assigns Asset Priority Index to remaining assets and reports the result to the Department and to the FRPP. Bureau provides a quarterly report of asset project accomplishments on mission critical and mission dependent assets to the Department. Bureaus with GSA Occupancy Agreements and/or bureau leased space provide annual projections of required GSA space for mission performance, cost of space, and plans for achieving cost savings on new agreements elapsing in the next fiscal year.</p> <p>10 – The use of the asset priority index for asset management decision-making is demonstrated.</p>	
TOTAL			

CRITERION	DESCRIPTION	METRIC	RATING
<div>Criterion #5:</div> <div>Performance Measure – Annual Operating and Maintenance (O&M) Costs</div> <div>Bureaus have an indication of the annual operating and maintenance costs of assets to use as a factor in decision-making. The Federal Real Property Council (FRPC) performance measure is reported to the Department and to the Federal Real Property Profile (FRPP).</div> <div>Linked to DOI Asset Management Plan – Consistent with FRPC standards; used in management decision-making; and evidence that the Plan is being used to achieve improved real property management.</div>	<p>Bureaus will be able to perform analysis of asset condition and O&M costs by asset type to identify high cost assets. Lower cost assets should be examined to determine best practices which contribute to low costs.</p> <p>Annual O&M costs include: 1) Recurring maintenance and repair costs; 2) Utilities (includes plant operation and purchase of energy; 3) Cleaning and/or janitorial costs (includes pest control, refuse collection and disposals to include recycling operations); and 4) roads/grounds expenses (includes grounds maintenance, landscaping and snow and ice removal from roads, piers and airfields).</p> <p>Bureaus will follow the DOI O&M costing model in collecting, recording and reporting the data.</p> <p>Bureaus will determine an estimate of the cost to operate and maintain each asset. Consistent with Department-wide standards, Bureau provides an estimate of O&M costs associated with the bureau’s prioritized actions for reporting to the FRPP. Bureau determines sustainment requirements; and develops and implements an asset management strategy following direction from the Asset Management Partnership and Senior Asset Management Officers.</p> <p>Each bureau, in order to have a successful asset program, will develop a budget for operation and maintenance work requirements across the asset’s lifetime to help determine the total cost of ownership for a planned or existing asset.</p> <p>The bureaus are to provide their strategy for implementing the 23 inventory data and performance metrics by June 1, 2005.</p>	<p>1-3 – Bureau has described program to identify program to monitor O&M costs of assets. Information should be provided that relates program methods of collection, analysis, and reporting.</p> <p>4-6 – Bureau can demonstrate process to make programmatic and/or resource reallocation decisions designed to reduce O&M or other costs. Bureau estimates annual operation and maintenance cost associated with each asset. Less than 70% of new/renewed Occupancy Agreements have tenant improvement costs documented, tracked and within budgetary goals.</p> <p>7-9– Measure can be used to track changes in efficiency over time and progress in efficiency improvement is reported by the Bureau quarterly. Bureau is able to report actual O&M costs for each asset which has a utilization rate required by FRPC: offices, warehouses, hospitals, laboratories, and housing. 70-90% of tenant improvement costs in new/renewed Occupancy Agreements are below the budgetary estimation, or strategies for reduction/elimination of the costs are in place.</p> <p>10 – Bureau has actual O&M costs for all assets and the bureau is reviewing them quarterly. O&M costs are a factor in all capital investment project decisions. Bureau ensures 100% of tenant improvement costs are projected, documented, justified and/or eliminated, when feasible, from every new/renewed agreement, utilizing co-location with other Departmental bureaus where significant savings in lifetime improvement costs can be achieved.</p>	
TOTAL			

CRITERION	DESCRIPTION	METRIC	RATING
<p>Criterion #6: Fleet Management Initiative</p> <p>Bureau maintains a fleet lifecycle program, including fleet plans for justification of need, acquisition, accountability, utilization and disposal of vehicles in the fleet.</p> <p><i>Linked to DOI Asset Management Plan – Reflecting latest shelf document, to the extent applicable; develop action plans and milestones for migration from “as is” to the “to be” objectives.</i></p>	<p>Lifecycle Fleet Program Elements</p> <p>Group 1: Determination of Need</p> <p>Element: Leased versus Purchase Analysis</p> <p>Element: Meets petroleum reduction strategies</p> <p>Element: Select AFV, if infrastructure is available</p> <p>Element: Mission justification</p> <p>Element: Meets bureau rightsizing strategy</p> <p>Group 2: Acquisition of Need</p> <p>Element: Budget approval (appropriations versus working capital fund)</p> <p>Element: Operating costs versus replacement costs, includes true costs of ownership versus leased estimates</p> <p>Element: Report reimbursement versus non-reimbursements (partnerships)</p> <p>Element: Ownership defined; Government-owned, GSA leased, or Commercial Leased</p> <p>Element: Bureau senior leadership evaluate executive summaries annually and determines number of motor vehicles needed</p> <p>Group 3: Accountability and Maintained</p> <p>Element: FBMS accounting (Capitalized \$15K+ & Systems-Controlled \$5k+)</p> <p>Element: Maintenance and warranty programmed into FBMS (includes safety checks for over-used motor vehicles)</p> <p>Element: Motor vehicle users input monthly motor vehicle into FBMS</p> <p>Element: Fleet card usage monitored by supervisors</p> <p>Element: PMO provides annual executive summaries to senior leadership on performance measures by motor vehicle types</p> <p>Group 4: Utilization and Disposal</p> <p>Element: Met bureau replacement criteria at a minimum; exception “unsafe”</p> <p>Element: Review for refurbishment</p> <p>Element: Exchange (No Proceeds) or Sale (Proceeds)</p> <p>Element: Disposal options; exchange, sale, donate, trade, title transfer, and destroy (unsafe)</p> <p>Element: FBMS Recordkeeping and mandatory reporting</p>	<p>1-3 – Bureau has completed 0-25% of the descriptive elements relating to fleet lifecycle program. No approved fleet plan.</p> <p>4-6 – Bureau has completed 26-50% of the descriptive elements that relate to the lifecycle program. Fleet plan is approved. Target implementation dates have been determined.</p> <p>7-9 – Bureau has completed 51-75% of the descriptive elements that relate to the lifecycle program. Performance measures are being used to track changes in efficiency. Bureau has capability to produce ad hoc reports as needed.</p> <p>10 – Bureau has completed 76-100% of the descriptive elements that relate to the lifecycle program. Bureau senior leadership executive fleet summaries and makes adjustments as needed. Ability to show how the strategy is used to update Asset Business Plans as needed. The strategy becomes the basis for formulating the annual operating budget and capital reinvestment plan.</p>	
TOTAL			

CRITERION	DESCRIPTION	METRIC	RATING
<p>Criterion #7:</p> <p>Identify and Dispose of Unneeded Assets</p> <p>The cost and time required to dispose of real property, and the financial recovery of the investment resulting from the disposal.</p> <p><i>Linked to DOI Asset Management Plan – Accurate and current inventory; evidence that real property management is consistent with agency strategic plan, AMP, and performance measures.</i></p>	<p>Disposal of assets, (real property, space-and fleet) needs to be conducted with the same scrupulous rigor as the acquisition of those assets.</p> <p>Analysis of the priority of the asset and the condition of the asset enables bureaus to target investment where it is needed most. High priority assets in poor condition may be good candidates for targeted improvement projects. Low priority assets in poor condition may be good candidates for disposal. Consideration of both condition and mission fit allows managers to make funding decisions that will result in the highest return on investment.</p> <p>The Department will establish a disposal program for appropriately reducing the department's inventory of low priority assets.</p> <p>Using the API, FCI and other factors, each bureau will review the assets within their portfolio and propose asset disposal to reduce the unneeded assets in the overall DOI asset inventory, when applicable.</p> <p>Using utilization rates, each Bureau with GSA Occupancy Agreements ensures underutilized space is released back to GSA in a timely manner.</p>	<p>1-3 – Bureau has demonstrated progress in acquiring data on asset condition, utilization, and mission dependency.</p> <p>4-6 – Bureau has defined criteria to identify disposal of assets to reduce O&M costs.</p> <p>7-9 –Bureau has reviewed less than 100% of assets against disposal criteria and has identified costs savings where available. Bureau has process in place to ensure full participation from local asset managers.</p> <p>10 – Bureaus can identify and document savings. Leadership of implementation enables other bureaus to create savings and improvements. Bureau has reviewed 100% of assets against disposal criteria and has identified costs savings where available.</p>	
TOTAL			